

Transfer Trace (transfer in state or out of state)

Version	Description	Changed By	Date
1.0	First draft	Fred Bourgeois	4/23/09
1.1	Revision	Kris Keller	5/21/09

Brief Description:

Actor will access existing trace document currently Under Investigation and prepare it for transfer in state or out of state.

Preconditions:

Actor has access to the proper instance of EMRS and at least Author level access.

Business Trigger:

A new infected animal or infected herd has been revealed prompting the need for tracing exposed animals. Index traces have been entered and a trace is ready to be prepared for transfer in state or out of state.

Data Entry Procedure:

1. Locate the Trace that needs to be transferred in one of two ways:
 - a. Search for the Investigation Summary for the infected premises.
 - b. Activate a trace view to view traces for an infected premises.
2. Select the Trace document that needs to be transferred in one of two ways:
 - a. From the Investigation Summary, scroll to the **Trace Forms** block, click on Traces Initiated, and select the trace that needs to be transferred.

Trace Forms

View ALL Traces for this Premises in Full Window

Number initiated **4** Initiated & Open **2**
 Number transferred in **0** Transferred & Open **0**

Traces Transferred In		Traces Initiated		Split Traces					
Trace ID	Act Date	ID 1	ID 2	Item	Qty	How Exposed	Destination	St	Result
KELLER1.0001.01	05/11/09	3 COWS SOLD 5...		Animal	3	Out of positi...	Silver Farm	WY	A-AT
KELLER1.0002.01	05/13/09	1 BULL SOLD 5...		Animal	1	Out of positi...	Dh Farms	CO	C-CT
KELLER1.0003.01	05/12/09	25 COWS	SOLD AT RIVER...	Animal	25	Out of positi...	Boone, Daniel	KY	C-CT
KELLER1.0004.01	05/20/09	10 ANGUS COWS	SOLD 5/20/09	Animal	10	Out of positi...			A-UI

- b. From the trace view, select the trace that needs to be transferred.
3. The Trace document opens in view mode.
4. Click the **Trace Actions** drop down at the top of the screen. You will have up to five options. (Note: instructions on using the **Clear Next Premises Info**, **Close This Trace**, and **Modify Next Premises Info** options are included in the Create EMRS Trace Document instructions.)



Transfer Trace (transfer in state or out of state)

Prep for Out of State Transfer

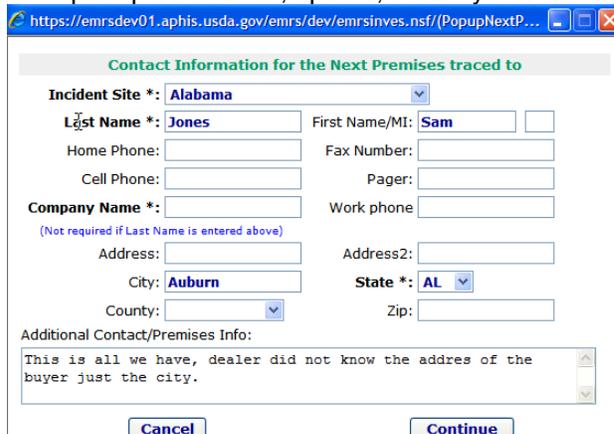
- Use the **Prep for Out of State Transfer** option if you will be transferring the trace to a premises out of state.

If a trace official responsible for the initial trace segment was not assigned, you will be prompted to enter the trace official and Continue. If a trace official was assigned earlier, this step is omitted.



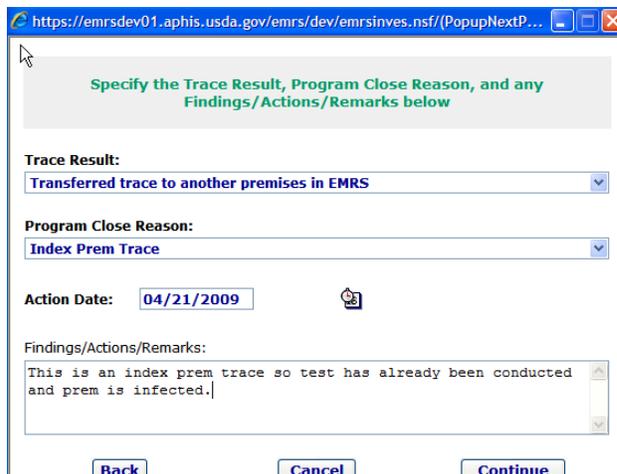
The screenshot shows a web browser window with the URL [https://emrsdev01.aphis.usda.gov/emrs/dev/emrsinves.nsf/\(PopupAssign...\)](https://emrsdev01.aphis.usda.gov/emrs/dev/emrsinves.nsf/(PopupAssign...)). The form title is "Enter a Trace Official for Trace ID 0011AA1.0027.01 to continue." Below the title, a green instruction reads: "The Trace Official should be the individual that performed the field work, NOT the data entry person." The form contains the following fields: "Trace Official:" with a text input containing "bourge" and a dropdown menu showing "Bourgeois, Fred G (VMO - LA)"; "Assign Date:" with a date input "04/21/2009" and a calendar icon; "Priority:" with radio buttons for "Not determined", "Extreme", "High", "Medium", "Low" (selected), and "None". At the bottom are "Cancel" and "Continue" buttons.

You will be prompted to enter, update, or verify destination contact information and Continue.



The screenshot shows a web browser window with the URL [https://emrsdev01.aphis.usda.gov/emrs/dev/emrsinves.nsf/\(PopupNextP...\)](https://emrsdev01.aphis.usda.gov/emrs/dev/emrsinves.nsf/(PopupNextP...)). The form title is "Contact Information for the Next Premises traced to". The form contains the following fields: "Incident Site *:" with a dropdown menu showing "Alabama"; "Last Name *:" with a text input "Jones" and "First Name/MI:" with a text input "Sam"; "Home Phone:", "Fax Number:", "Cell Phone:", and "Pager:" (all empty); "Company Name *:" with a text input and a note "(Not required if Last Name is entered above)"; "Work phone:" (empty); "Address:", "Address2:", "City:" with a dropdown menu showing "Auburn", "State *:" with a dropdown menu showing "AL", "County:" (empty), and "Zip:" (empty). Below the form is a text area for "Additional Contact/Premises Info:" containing the text "This is all we have, dealer did not know the address of the buyer just the city." At the bottom are "Cancel" and "Continue" buttons.

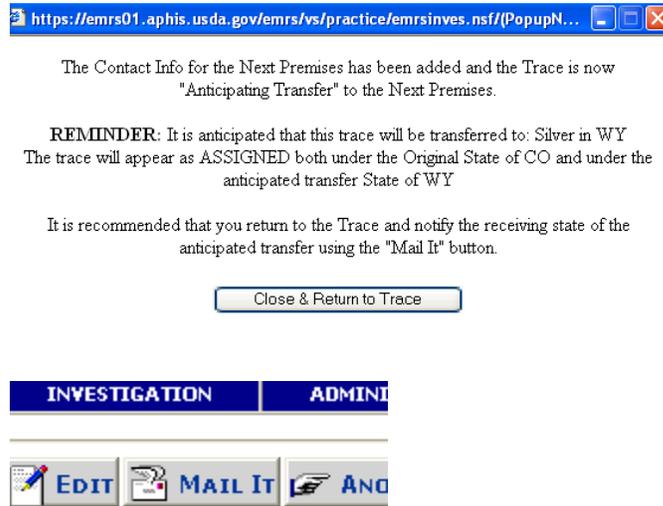
You will be prompted to enter a Program Closing Reason and an explanation of your findings and Continue.



The screenshot shows a web browser window with the URL [https://emrsdev01.aphis.usda.gov/emrs/dev/emrsinves.nsf/\(PopupNextP...\)](https://emrsdev01.aphis.usda.gov/emrs/dev/emrsinves.nsf/(PopupNextP...)). The form title is "Specify the Trace Result, Program Close Reason, and any Findings/Actions/Remarks below". The form contains the following fields: "Trace Result:" with a dropdown menu showing "Transferred trace to another premises in EMRS"; "Program Close Reason:" with a dropdown menu showing "Index Prem Trace"; "Action Date:" with a date input "04/21/2009" and a calendar icon; "Findings/Actions/Remarks:" with a text area containing the text "This is an index prem trace so test has already been conducted and prem is infected." At the bottom are "Back", "Cancel", and "Continue" buttons.

Transfer Trace (transfer in state or out of state)

A pop up will confirm that the Trace is now Anticipating Transfer to the next premises and recommend that you return to the Trace and notify the receiving state of the anticipated transfer using the Mail It button.



If after prepping a trace for transfer you have made a mistake or decide you need to back up and do further investigation before sending a link to the next state you can use the **Trace Actions** drop down to return the trace to under investigation by selecting **Change to Under Investigation**. You will then see the pop-up shown below. If you don't want to proceed then **Cancel** and return to the trace or **Continue** and this will revert the trace result back to Under Investigation, and you can continue your work.



Transfer In State

- b. Use the **Transfer In State** option if you will be transferring the trace to a premises in your state. (Note: The **Transfer In State** action combines the actions of "Preparing for Out of State Transfer" and "Accepting Transfer" into one action to make this a more efficient process since no state level security is involved and the same person may be doing both actions.)

If a trace official responsible for the initial trace segment was not assigned, you will be prompted to enter the trace official and **Continue**. If a trace official was assigned earlier, this step is omitted.

Transfer Trace (transfer in state or out of state)

https://emrsdev01.aphis.usda.gov/emrs/dev/emrsinves.nsf/(PopupAssign...

Enter a Trace Official for Trace ID 0011AA1.0027.01 to continue.

The Trace Official should be the individual that performed the field work, NOT the data entry person.

Trace Official:

 Assign Date:
 Priority: Not determined Extreme High Medium Low None

You will have two options:

https://emrsdev01.aphis.usda.gov/2OpenForm&TraceUNID=25C37CBBA7...

Select an option below to Transfer this Trace to another Premises

Enter 'Next Premises' Info & Accept Transfer Later -->
 Select an Existing InvSum To Transfer Trace To -->

Transfer In State: Enter Next Premises Info & Transfer Later

Select **Enter "Next Premises" Info & Transfer Later** if you only wish to enter the destination information and change the status to Assigned-Anticipating Transfer and either complete the transfer later or let someone else complete the transfer within your own state. First add or review destination information and then Continue.

https://emrsdev01.aphis.usda.gov/emrs/dev/emrsinves.nsf/(PopupNextP...

Contact Information for the Next Premises traced to

Incident Site *:
 Last Name *: First Name/MI:
 Home Phone: Fax Number:
 Cell Phone: Pager:
 Company Name *: Work phone:
 (Not required if Last Name is entered above)
 Address: Address2:
 City: State *:
 County: Zip:
 Additional Contact/Premises Info:
 Dealer, this may be his house, ni known animal location.

Enter the Program Closing reason for the node you will be closing since you are the person dealing with this node. When the transfer actually occurs, this step will be skipped and you will use the Accept Transfer process.

Transfer Trace (transfer in state or out of state)

Specify the Trace Result, Program Close Reason, and any Findings/Actions/Remarks below

Trace Result:
Transferred trace to another premises in EMRS

Program Close Reason:
Index Prem Trace

Action Date: 04/21/2009

Findings/Actions/Remarks:
No Investigation entered yet, [will transfer later.]

Buttons: Back, Cancel, Continue

You will be notified that the trace node is now Anticipating Transfer. It will allow you to Close and Return to the Trace.

The Contact Info for the Next Premises has been added and the Trace is now "Anticipating Transfer" to the Next Premises.

Close & Return to Trace

At this point, the trace is prepped for in-state transfer and is ready for you or another individual in your state to accept the transfer at a later time.

Transfer In State: Select an Existing InvSum to Transfer To

Selecting **Select an Existing InvSum to Transfer To** is the most efficient option if you are working with a trace that is Under Investigation and you know that it transfers directly to premises in your state with an Investigation Summary already in EMRS. This option combines preparing the trace for transfer and accepting the transfer.

If you have entered destination contact information in the Last or Company name fields, the system will automatically search for that premises when opening the search field.

Search field: Premises Name for: Smith Search

Incident	Premises	Premises ID	Company	Referral Control Num
select	CA TB 08	Smith, Linda 00G7VVP	Rodrigues & Rodrigues Dairy	080729180323F

If this is incorrect you can modify and search again. If it is correct, select the premises. This will give you an opportunity to review the premises information to make sure it is complete and correct.

Transfer Trace (transfer in state or out of state)

Verify that this is the Premises to Transfer the Trace To

Ref Ctrl #	080729180323F	Local ID #	5-10-00927
Premises ID	00G7VVP	Incident site	California
Last Name	Smith	First Name/MI	Linda
Home Phone		Fax Number	
Cell Phone	559-977-2745	Pager	
Company	Rodriguez & Rodriguez	Work phone	559-867-3724
Address	1748 W Mount Whitne	Address2	
City	Riverdale	State	CA
County	Fresno	Zip	93656-9441

Back Cancel Next

You will be given the option to assign a trace official, although this is not required at this time.

Select a Premises - Microsoft Internet Explorer

Optional - Enter a Trace Official for the new trace.

The Trace Official should be the individual that performs the field work,
NOT the data entry person.

Trace Official:

Trace Official:

Assign Date: 05/21/2009

Priority: Not determined Extreme High Medium Low None

Back Cancel Continue

You will be asked to enter a Result and Closing Reason for the node you are closing with the transfer.

Specify the Trace Result, Program Close Reason, and any Findings/Actions/Remarks below

Trace Result: Transferred trace to another premises in EMRS

Program Close Reason: Index Prem Trace

Action Date: 04/21/2009

Findings/Actions/Remarks:
No Investigation entered yet, will transfer later.

Back Cancel Continue

Transfer Trace (transfer in state or out of state)

The transfer will be accepted and you will then be able to go to either trace to review and/or continue your work.

 [https://emrs01.aphis.usda.gov/emrs/vs/practice/emrsinves.nsf/\(PopupSe...](https://emrs01.aphis.usda.gov/emrs/vs/practice/emrsinves.nsf/(PopupSe...)

Transfer Details					
	Trace ID	Prem ID	State	Status	
From:	KELLER1.0001.01	KELLER1	CO	COMPLETED	← Go Here
To:	KELLER1.0001.02	COLO12345	CO	ASSIGNED	← Go Here

5. For instructions on how the trace will be accepted and completed, refer to the Accept Trace instructions.